



Idaho XIX Account

February 2006

# Provider Electronic Solutions (PES) Quick Start Guide

## Table of Contents

<b>System Set-Up .....</b>	<b>1</b>
Equipment Requirements.....	1
Program Installation .....	1
 <b>Getting Started.....</b>	 <b>2</b>
Opening the PES Application.....	2
Logging On for the First Time.....	2
Updating Your Password.....	3
Password Rules.....	3
Using Password Help .....	4
Using a Temporary Password .....	4
Setting up Options.....	5
Modem.....	5
Web .....	6
Batch.....	7
Interactive .....	8
Carrier.....	9
Interactive Transmission Setup .....	9
Batch Transmission Setup.....	10
Dialing '9' for Outside Line.....	11
Payer/Processor .....	11
Retention .....	12
 <b>PES Installation and Upgrade .....</b>	 <b>14</b>
Equipment Requirements for PES .....	14
Before You Begin .....	15
Installing PES .....	15
CD Installation for Windows .....	15
Network Installation .....	20
Upgrading PES.....	21
CD Upgrade for Windows or Network .....	23
Completing the Upgrade and Starting PES.....	27

# System Set-Up

## Equipment Requirements

PES is designed to operate on a personal computer system with the following equipment requirements:

Minimum	Recommended
Pentium II with CD-ROM	Pentium II with CD-ROM
Windows 2000/XP	Windows 2000, NT, ME, XP
MS Internet Explorer 5.5 or higher	MS Internet Explorer 5.5 or greater
64 Megabytes RAM	128 Megabytes RAM
800 X 600 Resolution	1024 X 768 Resolution
28.8 baud rate modem or faster is preferred	33.6 baud rate modem or faster
100 MB Free Hard Drive Space	100 MB Free Hard Drive Space
CD-ROM	CD-ROM
Printer with 8 pt MS Sans Serif is preferred	Printer with 8 pt MS Sans Serif
If using the Web to submit batch transactions, you must have an Internet Service Provider (ISP), or access to an Internet connection.	If using the Web to submit batch transactions, you must have an Internet Service Provider (ISP), or access to an Internet connection.

**Note** If you have a version of Internet Explorer below 5.5 and do not have access to the Internet, contact Microsoft.

## Program Installation

The software is available on a CD-ROM. Upon completion of the installation process, store the original PES program CD in a safe place. In the event the program and files are damaged or deleted, the original CD will be needed to re-install the program.

PES may be installed on a computer's hard disk drive or on a network. Providers may choose between a "Typical" or "Workstation" (network) installation. You may install PES on as many PCs as needed, but it is recommended that each PC that has the PES software installed has different logon ID and password. You may contact the EDI Helpdesk if requiring additional logon ID's and passwords.

For network installation, only the PES database is loaded onto the server and the application is loaded onto individual personal computers (PCs). PES cannot be used with terminal server solutions.

**Note** See the PES Installation Guide for complete installation instructions.

# Getting Started

## Opening the PES Application

To access the Provider Electronic Solutions application after installation, use one of two methods:

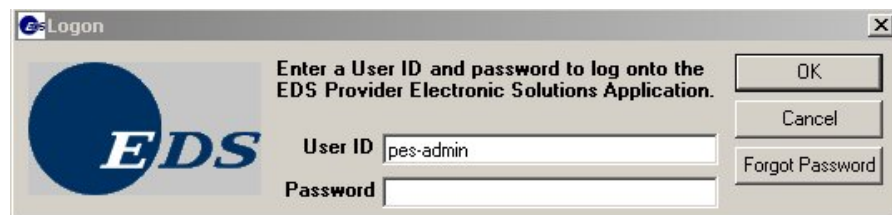
- Double click the folder named ID EDS Provider Electronic Solution on the desktop and then select EDS Provider Electronic Solutions.
- Select the **Start** button, then select Programs | ID EDS Provider Electronic Solutions | ID EDS Provider Electronic Solutions.

## Logging On for the First Time

The PES software provides basic security for the user through the logging-in process. The User ID defaults to **pes-admin**. This does not need to be changed.

When logging on for the first time after installing, you will be prompted to change your password. This also allows you to set up a tool in PES to help you should you forget your password in the future.

**Note** If you have been set up with a User ID other than pes-admin, enter your User ID in the User ID field, then tab to the password and enter the password set up for that User ID. For instruction on how to set up separate User IDs refer to Security in the Tools section.



**Step 1** The User ID field displays **pes-admin**. (This does not need to be changed unless you have been given an new User ID by your system administrator.)

**Step 2** In the password field in the Logon box:

- If you are installing PES, enter the password: **eds-pes**.
- If you are upgrading PES, enter your current password.

**Note** Your password will not be displayed; you will see \*\*\*\*\*.

**Step 3** Select **OK**. The message displayed prompts you to change your password.

**Step 4** Select **OK** to continue and follow the instructions for changing the password.

## Updating Your Password

The screenshot shows a window titled "EsLogon" with a close button (X) in the top right corner. On the left is the EDS logo. The main text reads: "Enter all fields to change a user password on the EDS Provider Electronic Solutions Application." Below this are several input fields: "User ID" (containing "pes-admin"), "Old Password", "New Password", "Rekey New Password", "Question" (a dropdown menu showing "In what city were you born?"), "Answer" (masked with "XXXXXXXX"), and "Rekey Answer" (masked with "XXXXXXXX"). In the top right corner are "OK" and "Cancel" buttons.

- Step 1** At the logon window, in the Old Password field:
- If you are installing, enter **eds-pes**.
  - If you are upgrading, enter your current password.
- Step 2** In the New Password field, enter a new password.
- Step 3** In the Rekey New Password field, re-enter the password.
- Step 4** In the Question field, select the dropdown arrow. A list of three questions appears:
- What is your mother's maiden name?
  - What is your father's middle name?
  - In what city were you born?
- Select one question.
- Step 5** Enter the answer in the Answer field. Answers are not case sensitive and you may use spaces.
- Step 6** Re-enter the answer in the Rekey Answer field.
- Step 7** Select **OK**.
- Step 8** The next message displayed tells you that you have successfully updated your password. Select **OK** to continue.
- If you are doing an upgrade, the application main window will appear and you are ready to start using PES.
  - If you are doing a new installation, the system will prompt you in an application text box to set up your personal options. Select **OK**. For more on options, go to Setting up Options in this section.

## Password Rules

Passwords are not case sensitive. A password may be any combination of alphabetic, numeric, and special characters. A password must be at least 5 characters in length but no more than 10 characters.

---

**Note** For instructions on what to do if you forget your password, go to Password Help.

---

**Note** Your password will expire every 30 days unless otherwise indicated in the retention settings in the **Tools | Options** menu in PES. For instructions on how to change the retention settings, refer to Setting Up Options on page 13.

---

### Using Password Help

If you forget your PES password, you can use the password question to create a new password.

**Step 1** Select **Forgot Password** in the Logon box. The Password Help box appears.

**Step 2** Enter the correct answer. Select **OK**.

---

**Note** The answer is displayed in asterisks. Be sure that you type the answer correctly. You can make three attempts to answer the password question.

---

- If you correctly answer the password question, you will be prompted to create a new password. After creating the new password and rekeying it, select **OK**. The PES application opens.
- If you incorrectly answer the password question three times, you will receive an application prompt asking if you wish to reset your password. Select **Yes**. The system creates a 5-digit reset key number. Write down this number for contacting the EDI Help Desk.

**Step 3** Select **OK**. The PES application closes. See Using a Temporary Password to continue.

### Using a Temporary Password

**Step 1** Call MAVIS and say TECHNICAL SUPPORT immediately after the MAVIS greeting.

(800) 685-3757 toll free

(208) 383-4310 in the Boise calling area

8:00 a.m. to 5:00 p.m. MT

Monday - Friday (excluding State holidays)

You will need the following Information when calling the EDI Help Desk to reset a password:

- Idaho Medicaid provider number
- Name

- User ID (from the Logon dialogue box)
- 5-digit reset key number (a sample is shown in below inside the red oval)




---

**Note** When you call the EDI Help Desk, you will get a temporary 8-character alphanumeric password.

---

- Step 2** Open the PES application.
- Step 3** Enter the temporary password in the Logon Box Password field. Select **OK**. The PES application will now open.
- Step 4** Go to **Tools | Change Password** in the PES toolbar to change your password and set up a new password question for possible future use.

---

**Note** It is strongly recommended that, immediately after logging in with a temporary password, the user set up a new password, question, and answer. See the chapter titled Tools, Changing Your Password.

---

## Setting up Options

Options must be set up the first time you use the software. There are seven options that must be confirmed or created. They are:

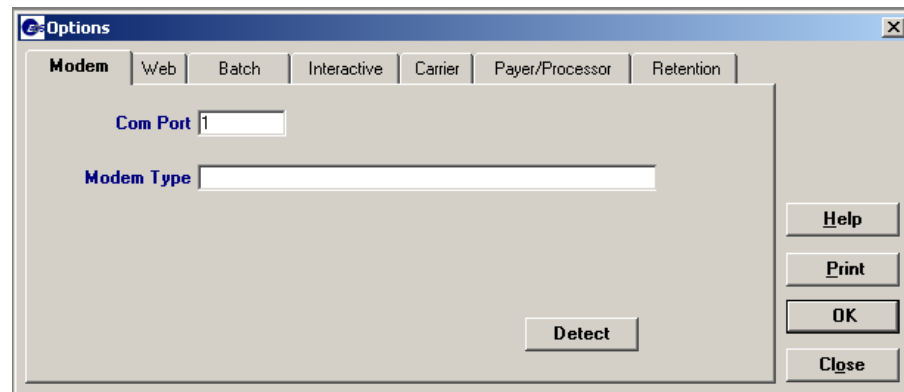
- Modem
- Carrier
- Web
- Payer/Processor
- Batch
- Retention
- Interactive

The Options window displays with the Modem tab on top.

To access Options after the initial setup, select **Tools | Options**.

### Modem

Com Port should be the PC communications port (also called serial port) to which the modem is connected. The software supports only COM1, COM2, COM3 and COM4. If the modem is set up on any other Com Port, contact the hardware vendor to relocate the modem to one of the above Com Ports.



**Step 1** If your PC has a modem, select the **Detect** button to allow the software detect the Modem Type and Com Port. If the modem is not detected, use the drop down window and select the generic option that most closely matches the modem installed on the system.

**Step 2** Enter the appropriate Com Port number 1, 2, 3, or 4.

**Note** Even if you do not have a modem and are submitting claims using the web server method option, or the diskette method option, a Com Port and modem type must still be selected. Click in the field Modem Type and select any modem from the list.

**Step 3** Select the **Web** tab to continue setting up options.

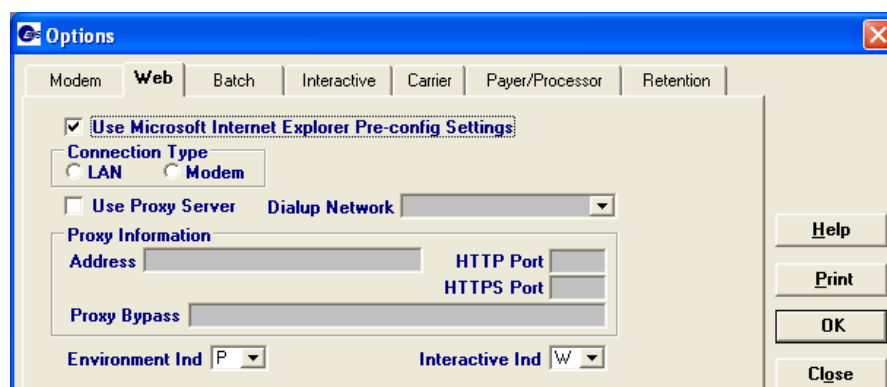
**Tip** If you do not know what type of modem is installed on your computer, select the **Start** button, select setting, select control panel, select phone and modem options, select modems or diagnostic to determine what type of modem is installed and what Com Port the modem is installed on.

## Web

This information is necessary for connecting with the Web site for uploading and downloading batch files.

### Uploading or downloading using an existing Internet connection

Use this option if you have an existing Internet connection using any of the following connection types: cable modem, DSL modem, ISDN modem, local area network (LAN) connection, or analog modem.





**Step 1** Verify that the Use Microsoft Internet Explorer Pre-config Settings checkbox is checked. If this box is checked this indicates that the PES application will use the same settings as the Microsoft browser to connect to the Internet. The box is selected by default.

---

**Tip** The default is to Use Microsoft Internet Explorer Pre-config Settings. It is recommended that you leave the box checked when you use the Web option.

---

**Step 2** Select the appropriate environment indicator. The Environment Ind box defaults to P for the production environment. Select **T** only if this is used to test for software connectivity.

**Step 3** Select the appropriate interactive indicator. The Interactive indicator box defaults to W for the web method option to be done on interactive transactions. If the user is going to use the dial-up method, choose the drop down box and select the BBS and a B will display in the box.

---

**Note** If you need to connect to the Internet using a proxy setting for the PES application, use the following steps:

---

**Step 4** Uncheck the Use Microsoft Internet Explorer Pre-config Settings checkbox.

**Step 5** Select the appropriate connection type. The Connection Type indicates whether the Internet connection is established through a LAN or a modem.

**Step 6** Check the Use Proxy Server check box, when a proxy server is used to connect to the Internet. The proxy server is commonly used with a LAN connection. If checked, the Proxy Information boxes including Address, Hypertext Transfer Protocol (HTTP) Port, secure HTTPS Port, and Proxy Bypass will be available for entry.

**Step 7** Enter a proxy address if you selected the Use Proxy Server. This is the IP address or Universal Resource Locator (URL) address of the proxy server used to connect to the Internet. This is a required box if you selected the Use Proxy Server checkbox.

**Step 8** Enter your HTTP port if you selected the Use Proxy Server. This is the port number that the proxy server uses for standard Hypertext Transfer Protocol (HTTP) communication. This is a required box if you checked the Use Proxy Server checkbox.

**Step 9** Enter the HTTPS port if you selected the Use Proxy Server. This is the port number that the proxy server uses for secure Hypertext Transfer Protocol (HTTPS) communication. This is a required box if you checked the Use Proxy Server checkbox.

**Step 10** Enter a proxy bypass, if desired, if you selected Use Proxy Server. This is the URL address that does not use the proxy server.

## Batch

Batch contains the Logon ID and password information that allows the user to submit claims for services in an electronic format. If you do not know what your logon ID and password are, please contact the EDS EDI help desk toll free at (800) 685-3757 or in the Boise calling area at (208) 383-4310, ask for TECHNICAL SUPPORT.

The screenshot shows the 'Options' dialog box with the 'Batch' tab selected. The dialog has a title bar with a close button. Below the title bar are tabs: Modem, Web, Batch (selected), Interactive, Carrier, Payer/Processor, and Retention. The main area contains the following fields:
 

- Logon ID: A text input field.
- Password: A text input field.
- Entity Type Qualifier: A dropdown menu.
- Last/Org Name: A text input field.
- First Name: A text input field.
- Modem Init String: A text input field.

 On the right side of the dialog, there are four buttons: Help, Print, OK, and Close.

- Step 1** Enter your Logon ID and Password. The logon ID has 9 digits. The password has 8 alpha-numeric characters and is case sensitive. It must be keyed exactly as displayed on the CD mailer or letter.
- Step 2** Select the one of the following Entity Type Qualifiers for the facility:
- **1** – Person (Individual Provider)
  - **2** – Non-Person (Group or Facility)
- Step 3** Enter the Last Name of the individual provider, or the Organization Name if a Facility or Group.
- Step 4** Enter the first name of the Individual if the Entity Type Qualifier is a 1.
- Step 5** The Modem Init String entry will be defaulted from the Modem selected on the Modem Tab.
- Step 6** Select the Interactive tab to continue to set up options.

### Interactive

The screenshot shows the 'Options' dialog box with the 'Interactive' tab selected. The dialog has a title bar with a close button. Below the title bar are tabs: Modem, Web, Batch, Interactive (selected), Carrier, Payer/Processor, and Retention. The main area contains a single field:
 

- Modem Init String: A text input field.

 On the right side of the dialog, there are four buttons: Help, Print, OK, and Close.

The Modem Init String will be defaulted when the Modem is selected on the Modem Tab.

Select the **Carrier** tab to continue to set up options.

## Carrier

This screen is used by the software to interface with the EDS bulletin board system to transmit transactions to Idaho Medicaid. You will need to confirm the default settings for both the interactive and batch transmission setups. At the bottom of the screen, there is a box that shows these two options.

When you select the Carrier tab, the screen opens with the Interactive option highlighted.

Transaction Type	Carrier Id	Net Id	Phone Number	Dtr
INTACT TRANSMIT				28800
BATCH TRANSMIT				28800

You can view and confirm the setup information for each option beginning with Interactive.

## Interactive Transmission Setup

- Step 1** Select **INTACT TRANSMIT** as the Transaction Type at the bottom of the screen and confirm that it says INTACT TRANSMIT in the Trans Desc field at the top of the screen.

Transaction Type	Carrier Id	Net Id	Phone Number	Dtr
INTACT TRANSMIT				28800
BATCH TRANSMIT				28800

- Step 2** Click in the Carrier ID field and select **INT-800**. When you make this selection, the other fields in the screen will auto-fill. You will now need to confirm that the information is correct.

**Step 3** Confirm the following settings:

Field	Setting
Trans Desc	INTACT TRANSMIT
DTR	28800
Carrier ID	INT_800
Phone Number	18666270017
Net ID	IDMP
Net Password	idaho
ATT menu	1
Production/ Test Indicator	P

**Step 4** Select **BATCH TRANSMIT** at the bottom of the screen as the Transaction Type to continue to set up options.

### Batch Transmission Setup

**Step 1** Select **BATCH TRANSMIT** at the bottom of the screen as the Transaction Type and confirm that it says BATCH TRANSMIT in the Trans Desc field at the top of the screen.

Transaction Type	Carrier Id	Net Id	Phone Number	Dtr
INTACT TRANSMIT				28800
BATCH TRANSMIT				28800

**Step 2** Click on the **Carrier ID** field and select **BTCH\_800**. When you make this selection, the other fields in the screen will auto-fill. You will now need to confirm that the information is correct.

**Step 3** Confirm the following settings:

Field	Setting
Trans Desc	Batch Transmit
DTR	28800
Carrier ID	BTCH_800
Phone Number	18666270015
NET ID	IDMP
Net Password	Idaho
ATT Menu	11
Production/ Test Indicator	P

- Step 4** After completing the interactive and batch setup, select the **Payer/Processor** tab or select **OK** to save and return to the main window.

### Dialing '9' for Outside Line

If you must dial a 9 (or other number) to access an outside phone line on your modem, you will need to modify the phone number for both the Interactive and Batch Carrier.

Transaction Type	Carrier Id	Net Id	Phone Number	Dtr
INTACT TRANSMIT	INT_800	idmp	9,18666270017	38400
BATCH TRANSMIT	BTCH_800	idmp	9,18666270015	38400

- Step 1** Click in the **Phone Number** field to highlight the number.
- Step 2** Use your left arrow to move the cursor to the far left of the field and then type a **9** and a comma (,) at the beginning of the field in front of the 1 so it displays 9,18666270015.
- Step 3** Repeat for both the Interactive and Batch Carrier options.

### Payer/Processor

This screen is defaulted to the required setting for transmission of services to the Idaho Medicaid program. Please note that the technical support telephone numbers are also included on this screen for future reference.

- Step 1** Select the **Payer/Processor** Tab.

**Options**

Modem Web Batch Interactive Carrier **Payer/Processor** Retention

**Name** STATE OF IDAHO DHW

**ETIN** 445454161

**Identifier Code Qualifier** PI

**Identifier Code** 82-6000995

**Technical Support Contact** 1-800-685-3757 or 208-383-4310

Help  
Print  
OK  
Close

**Step 2** Confirm the following default settings:

Field	Setting
<b>Name</b>	STATE OF IDAHO DHW
<b>ETIN</b>	445454161
<b>Identifier Code Qualifier</b>	PI
<b>Identifier Code</b>	82-6000995

**Step 3** Select the **Retention** tab or select **OK** to save and return to the main window.

## Retention

The retention settings allows you to retain data for a specific number of days or transactions before the information is deleted from the software or before notification is given for transactions that can be archived.

**Step 1** Select the **Retention** tab.

**Options**

Modem Web Batch Interactive Carrier Payer/Processor **Retention**

**Archive Days** 30

**Max Batch** 10

**Max Verify** 25

**Max Log** 10

**Max Submit Reports** 30

**Max Bulletin** 10

**Password Expiration Days** 30

Help  
Print  
OK  
Close

**Step 2** Confirm the following default settings or change the settings to meet your business needs. Use the scroll-down feature to select the appropriate setting, or key the value you have determined meets your business needs.

Retention Field	Default Setting/Description
<b>Archive Days</b>	<p><b>Default days: 30.</b></p> <p>Maximum number of Days is 999 before notifying the user it is time to archive submitted forms.</p> <p>When submitting large volumes of claims, archive claims every 30-60 days.</p>
<b>Max Batch</b>	<p><b>Default listings: 10.</b></p> <p>Maximum number of batches retained in the Resubmission option of the Communication menu.</p> <p>Listing on the Batch list will be deleted on a first-in/first-out basis. Maximum number of batches that can be retained is 999.</p>
<b>Max Verify</b>	<p><b>Default number of download files: 25.</b></p> <p>Maximum number of downloaded responses is 999.</p> <p>Downloaded files will be deleted on a first-in/first-out basis.</p>
<b>Max Log</b>	<p><b>Default number of Communication log backups: 10.</b></p> <p>Maximum number of Communication log backup files retained is 999.</p>
<b>Max Submit Reports</b>	<p><b>Default number of submission reports: 30.</b></p> <p>Maximum Submission Reports retained is 999.</p>
<b>Max Bulletin</b>	<p><b>Default number of Bulletins: 10.</b></p> <p>Maximum Bulletins retained is 999.</p>
<b>Password Expiration</b>	<p><b>Default number of days before password expires: 30.</b></p> <p>Maximum number of days before Password expires is 99.</p>

**Step 3**      Select **OK** to save.

## PES Installation and Upgrade

The PES software is available on a CD. Upon completion of the installation process, store the original PES program CD in a safe place. In the event the program and files are damaged or deleted, the original CD will be needed to re-install the program.

---

**Note** Windows NT and 2000 Pro Users with Windows NT or Windows 2000 Pro must have 'administrator' rights to install this software.

---



---

**Note** Do not re-install the software. Re-installing will erase your PES database and any lists you have created or edited and any forms you have submitted.

---

PES may be installed on a computer's hard disk drive or on a network. When you begin the installation, you will need to choose between a "Typical" or "Workstation" installation. Choose Typical if you are installing the software on a personal computer or as a stand alone. Choose Workstation if you are installing on a personal computer connected to a network and you wish to share a common database on the network. The user may install PES on as many PCs as needed. It is recommended that each PC that has the PES software installed, have different logon ID's and passwords. You may contact the EDI Helpdesk if requiring additional logon ID's and passwords.

For network installation, the database should reside on the server and the application can be loaded onto individual PCs. Choose Typical to install the database on the network making sure to specify a network path. Choose Workstation to install the application on all client PCs.

### Equipment Requirements for PES

Provider Electronic Solutions (PES) is designed to operate on a personal computer (PC) system with the following equipment requirements:

Minimum	Recommended
Pentium II with CD-ROM	Pentium II with CD-ROM
Windows 2000/XP	Windows 2000, NT, ME, XP
MS Microsoft Internet Explorer 5.5 or higher	MS Microsoft Internet Explorer 5.5 or greater
64 Megabytes RAM	128 Megabytes RAM
800 X 600 Resolution	1024 X 768 Resolution
28.8 baud rate modem or faster is preferred, or other Internet connection	33.6 baud rate modem or faster, or other Internet connection
100 MB Free Hard Drive Space	100 MB Free Hard Drive Space
CD-ROM	CD-ROM
Printer with 8pt MS Sans Serif is preferred	Printer with 8pt MS Sans Serif



Minimum	Recommended
If using the Web to submit batch transactions, you must have an Internet Service Provider (ISP), or access to an Internet connection.	If using the Web to submit batch transactions, you must have an Internet Service Provider (ISP), or access to an Internet connection.

---

**Note** If you have a version of Internet Explorer below 5.5 and do not have access to the Internet, contact Microsoft.

---

## Before You Begin

PES software comes on a CD that includes other Idaho Medicaid provider resources. When you place the CD in your computer, it will automatically open a main menu.

If the CD does not automatically open the main menu within 30 seconds, complete the following steps before calling EDS Provider Services.

- Step 1** Remove the CD from the drive and re-insert the CD in the drive. Verify that the label is facing up when inserting the CD. The CD should auto-run. If it does not, continue to Step 2.
- Step 2** Double click the **My Computer** icon on the desktop and select the CD-ROM drive, or select the **Start** button on the desktop and select Programs | Windows Explorer. Then select the CD-ROM drive.
- Step 3** Select the **AutoRun** icon (autorun.exe). The Main Menu will open.
- Step 4** Click the **PES** button on the Main Menu. If you have never installed PES on your computer or computer network, you will want to select the **New Install** option. If you have installed and used PES, you will want to select the **Upgrade** option.

**Warning!** A new install of PES will erase any previous versions on your computer and any associated databases.

## Installing PES

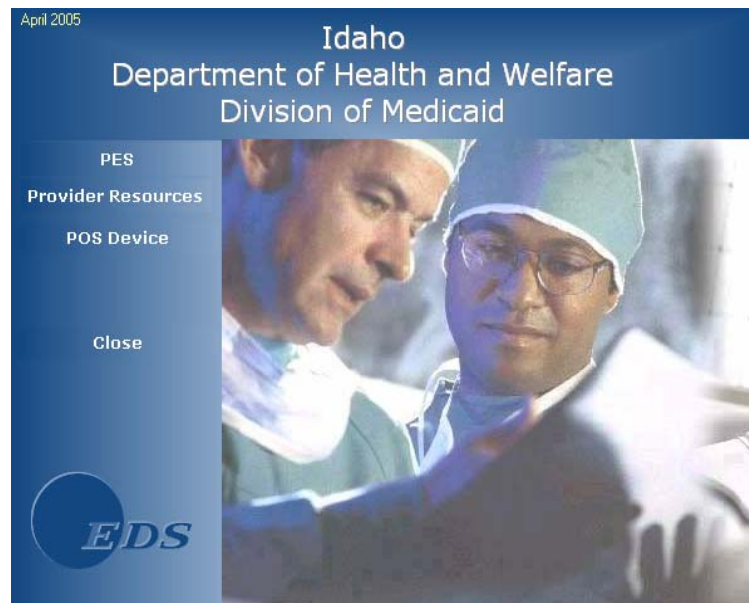
This section describes how to install PES on your computer or computer network from a CD. If you have never installed PES, you will want to select the **New Install** option from the PES Main Menu. If you have installed and used PES, you will want to select the **Upgrade** option described in the next section.

### CD Installation for Windows

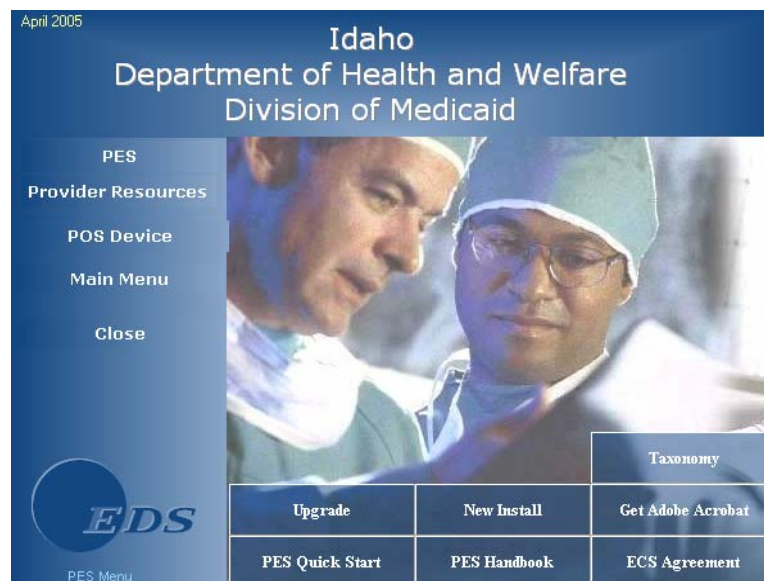
#### Beginning the Installation

If the AutoPlay option is running on your computer, use these instructions to begin the installation.

- Step 1** Insert the CD into the computer. (AutoPlay will automatically begin the installation.) Main Menu screen displays. Click **PES**.



**Step 2** The PES Main Menu displays. Click **New Install**.



**Step 3** The New Installation screen displays. Read the warning and click **New Install**.



- Step 4** Another warning screen displays. This screen is added insurance that users will not delete any prior installation of PES. Click **New Install**.



- Step 5** The Welcome screen displays. Click **Next**.

**Step 6** Select **Choosing the Type of Installation**.

#### Manual Load Instructions

If the AutoPlay option is not running on your computer, use these instructions to begin the installation.

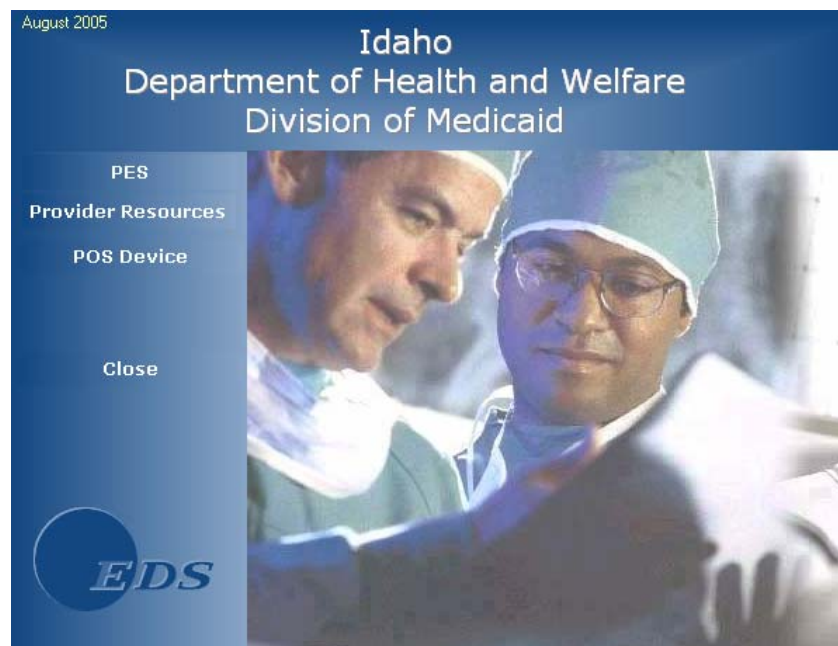
**Step 1** Insert the CD into the computer.

**Step 2** Select **Start | Run**.

**Step 3** Click on **Browse** button and select the CD drive and highlight **autorun.exe**.

**Step 4** Click **Open**.

**Step 5** Click **OK**. The Main Menu screen displays.



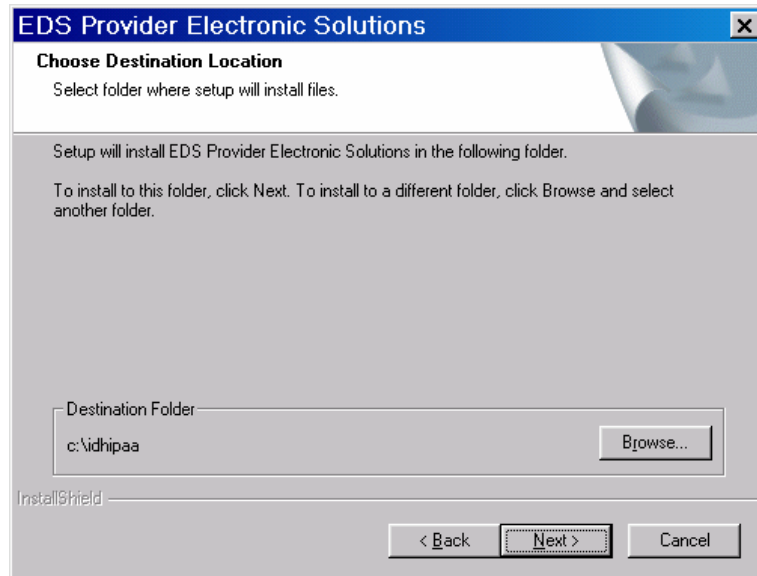
**Step 6** Repeat steps 1 through 5 in Beginning the Installation.

**Step 7** Select **Choosing the Type of Installation**.

#### Choosing the Type of Installation

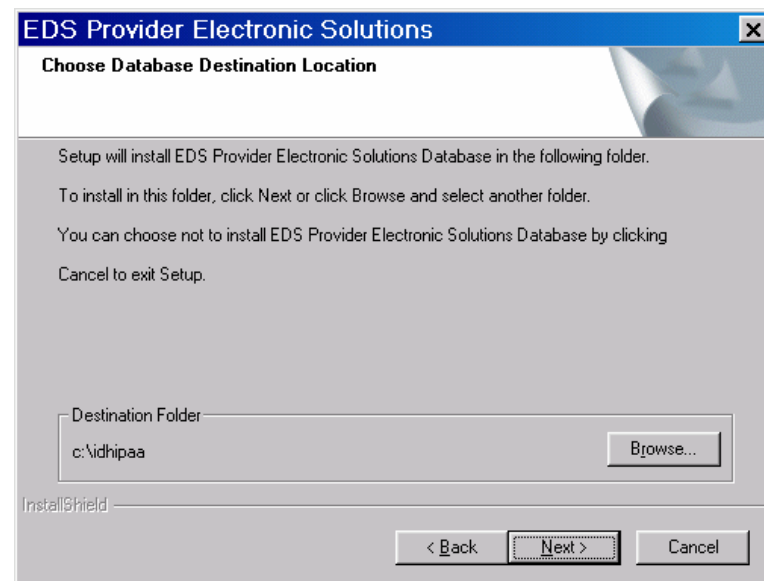
**Step 1** Click on the type of setup needed. **Typical** is for single-PC setup. Click **Next**.

**Step 2** Click **Next** to accept the default destination for the software.



**Step 3** Click **Next** to accept the default destination for the database.

**Tip** Be sure to make a note of where you are installing the database for future workstation setups.



**Step 4** Click **OK**. A graphic displays that shows the progress of the installation. The user can cancel installation at any time by clicking the **Cancel** button in the graphic display.

### Completing the Installation and Getting Started

When installation is complete, do not remove the CD until the installation process returns you to the desktop view.

- Step 1** Click the **Finish** button to exit installation. When installation is complete, a folder will be available on the users desktop that contains two icons. A PES icon to start the application and an Upgrade icon that checks for future upgrades.
- Step 2** To start PES, double-click the blue **EDS PES** icon in the folder labeled ID EDS Provider Electronic Solutions or click on the **Start** button in the Windows menu bar and select **Programs**. Select **ID EDS Provider Electronic Solutions**.

## Network Installation

To install the application for use by several users, the administrator will need to perform a network installation. The following instructions will install the shared database on a network and the rest of the application on the PC the administrator is installing from. First install PES on the administrator's PC, next install the database on the network, and finally install PES on other PCs as needed.

**Important:** When applying an upgrade in a network environment, it is important that everyone's copy of the application remains synchronized with the version of the database. To ensure that this happens, make sure that:

- No one is using the database at the time
- All PCs running the application are upgraded
- The database is upgraded

- Step 1** Before you begin the installation, create a target directory on your network to hold the PES database.
- Step 2** Follow the installation instructions for the operating system that the administrator is using.
- Step 3** When asked what type of installation is desired, select **Typical** on the administrator's PC and network. For all other PCs that will be running PES, when asked what type of installation is desired, select **Workstation**.
- Step 4** Select location on PC or accept default directory for application.
- Step 5** For location of database, select the directory on the network where the database is to be located. This will allow users from multiple PC's to access the application data.
- Step 6** When asked, enter the location on the network where the database was installed.

## Beginning Installation on a Network

- Step 1** Log on with a user ID that has administrator privileges.
- Step 2** Follow the steps for Beginning the Installation under CD Installation for Windows.
- Step 3** Follow the steps for Choosing the Type of Installation, selecting **Typical**. At Step 3, select the target directory you created for the database.
- Step 4** When installation is complete, click the **Finish** button to exit the installation.

- Step 5** If this installation is not on the administrator's PC, select **Start** to logoff.  
**Important:** Do not remove the CD.

#### Completing Network Installation

- Step 1** Repeat Steps 1 and 2 for Installing on a single PC within a network.
- Step 2** Select **Typical** for type of setup. Click **Next**.
- Step 3** Click **Next** to accept the default destination for the software.
- Step 4** Click **Browse** to select the target directory on the network in which you wish to locate the database. Click **OK**.
- Step 5** When the installation of the database on the network is complete, click on **Finish** to exit the installation.
- Step 6** Click **Yes, I want to restart my PC now**.
- Step 7** Remove the CD from the CD-ROM drive.
- Step 8** Click **Finish** to complete the installation.

#### Installing on Individual PCs Within a Network

Follow the steps for installing PES on an individual PC under CD Installation for Windows.

When prompted to select the type of installation, choose **Workstation**.

When prompted to select the location of the database, select **Browse**, locate the target directory on the network that you established, and select **OK**.

## Upgrading PES

This section describes how to upgrade PES on your computer or computer network from a CD, Web Server or Bulletin Board System (BBS). Upgrading from CD or the Web Server is recommended because it is quicker than downloading files from the BBS Batch method.

#### Get Upgrades

Selecting the option, **Get Upgrades**, will dial the Web Server or Bulletin Board System (BBS) and download any new upgrades.

The user is occasionally prompted to check for upgrades when they log into the PES program.

If you have installed the application on several PCs, you will need to copy the upgrade file to each PC and apply the upgrade individually.

#### Download Upgrades using the Web Server Method

- Step 1** Select **Tools** from the main menu
- Step 2** Select **Get Upgrades**. At the bottom left corner of the PES window, it will indicate "downloading upgrades from the Web Server".
- Step 3** Select **OK** to return to the PES application.
- Step 4** Close the PES application and follow the instructions to apply the upgrade.

### Download Upgrades using the BBS Batch Method

**Step 1** Select **Tools** from the main menu.

**Step 2** Select **Get Upgrades**. The software will begin the dialing sequence, connect to the BBS (Bulletin Board System), and download any new available upgrades to the program folder on your hard drive where PES is installed.

You will see the following sequence of messages while the system is checking the BBS for upgrades:

```
Dialing the host at....  
Connecting to the network. Please wait.  
Logon to BBS.  
Checking for upgrade files.  
Upgrade downloading (if there is a new upgrade)  
No upgrades found (if there is no new upgrade)  
1 upgrade available (if there is a new upgrade)  
No upgrades available to apply (if there is no  
new upgrade)
```

**Step 3** Select **OK** to return to the PES application.

**Step 4** Close the PES application and follow the instructions to apply the upgrade.

### Apply Upgrade

**Step 1** Close PES (if still open).

**Step 2** Select the **Start** button on your desktop and select **Programs**.

**Step 3** Locate the option for **ID EDS Provider Electronic Solutions** and select **Upgrades**. You will be prompted to exit all programs prior to continuing with the upgrade.

**Step 4** After exiting all programs, select **Yes** to the question to apply the upgrade. A series of questions will prompt you to move through the application of the upgrade. Answer the questions until the upgrade is completed. This usually takes less than one minute.

### Upgrades From CD

Periodically, EDS will send a new Idaho Medicaid Provider Resources CD to all active providers. The CD will contain the latest version of PES for a new installation and upgrades for users who have already installed PES. Upgrading from CD or the Web Server is recommended because it is quicker than downloading files from the BBS Batch method.

To apply a computer or computer network upgrade from the CD, follow the steps for opening the Main Menu under Before You Begin.

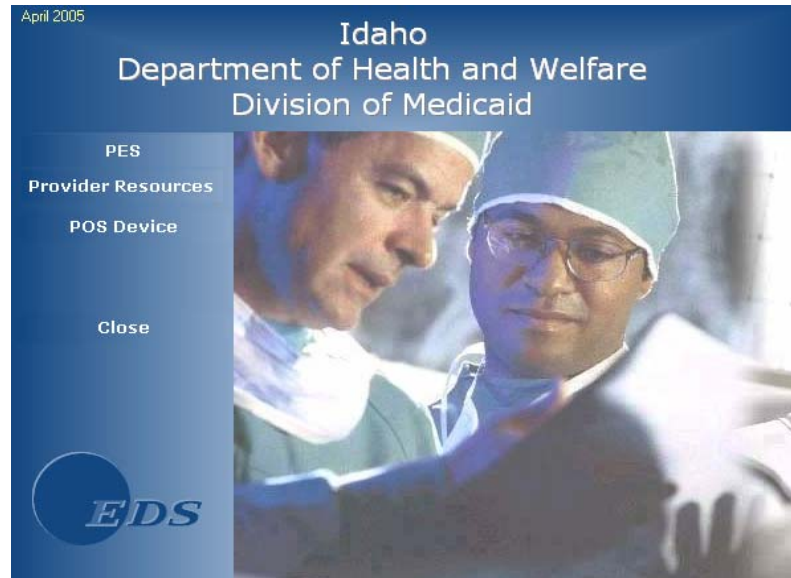


## CD Upgrade for Windows or Network

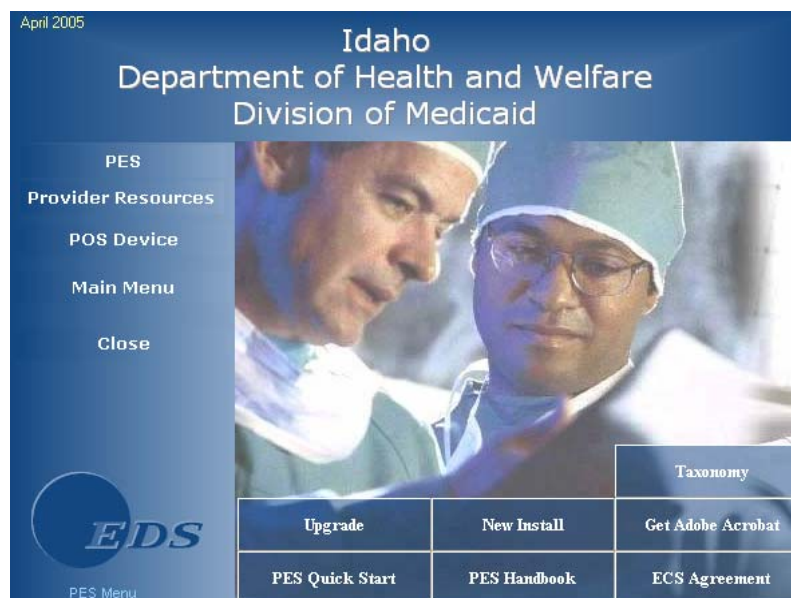
### Beginning the Upgrade

Use these instructions to begin a PC or Network upgrade.

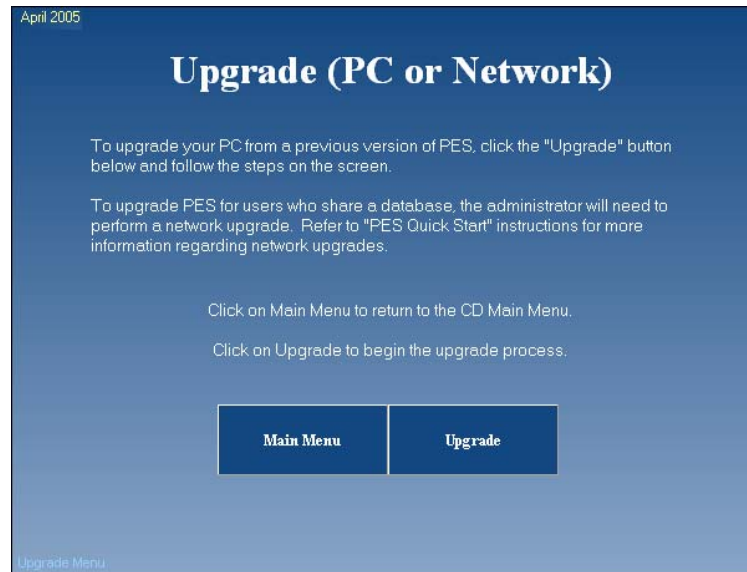
**Step 1** Insert the CD into the computer. The Main Menu screen displays. Click **PES**.



**Step 2** The PES Main Menu displays. Click **Upgrade**.



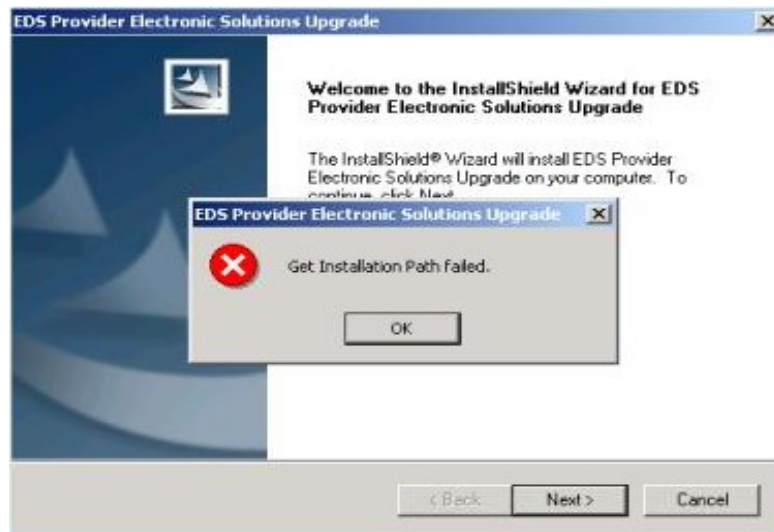
**Step 3** The Upgrade screen displays. Click **Upgrade**.



**Step 4** The Welcome screen displays. Click **Next**.



**Step 5** Select **Continuing the Upgrade**. The installation wizard automatically detects where your database is installed (PC or network). Because the win.ini file is used to determine your database path, you will need to upgrade from a PC where PES has already been installed. If you try and upgrade from a PC where PES has not been previously installed, an error message is displayed:



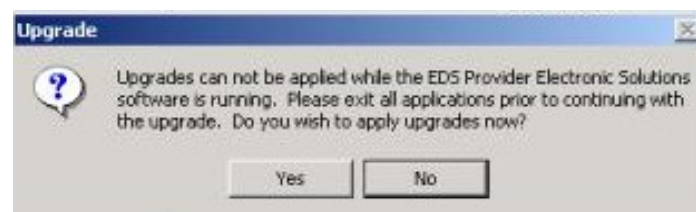
### Manual Load Instructions

If the CD does not automatically launch, use these instructions to begin the upgrade.

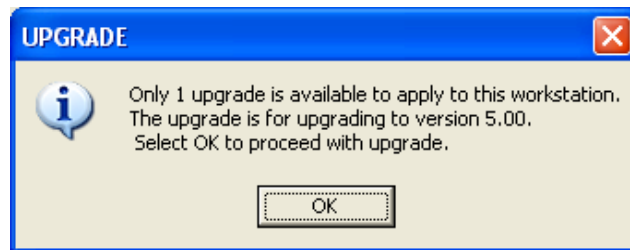
- Step 1** Insert the CD into the computer.
- Step 2** Select **Start | Run**.
- Step 3** Click on **Browse** and select the CD drive.
- Step 4** Highlight **autorun.exe**.
- Step 5** Click **Open**.
- Step 6** Click **OK**. The Main Menu screen displays.
- Step 7** Repeat steps 1 through 4 in Beginning the Upgrade.

### Continuing the Upgrade

- Step 1** Click **Next** after the Welcome screen displays.
- Step 2** After exiting all programs, click **Yes** to the question to apply the upgrade. A series of questions will prompt you to move through the application of the upgrade.

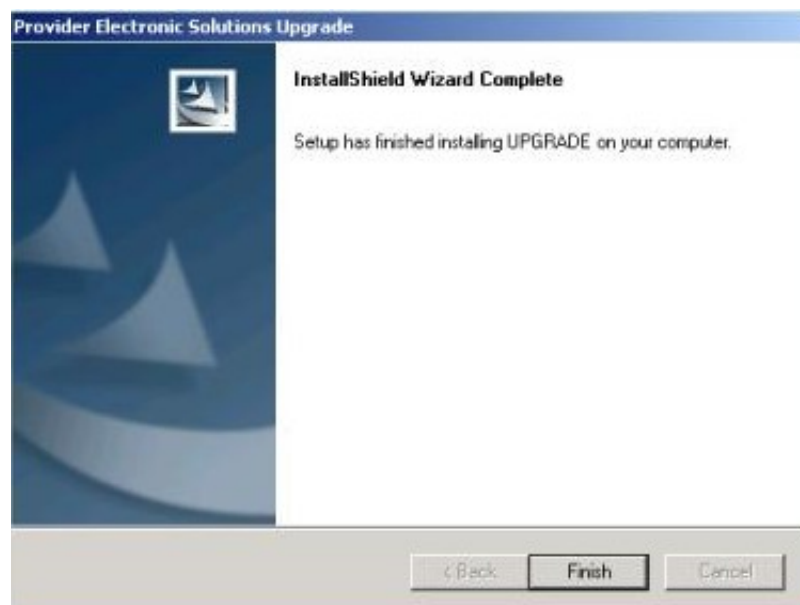


- Step 3** An upgrade message displays to confirm the upgrade to PES version 5.0. Click **OK**.

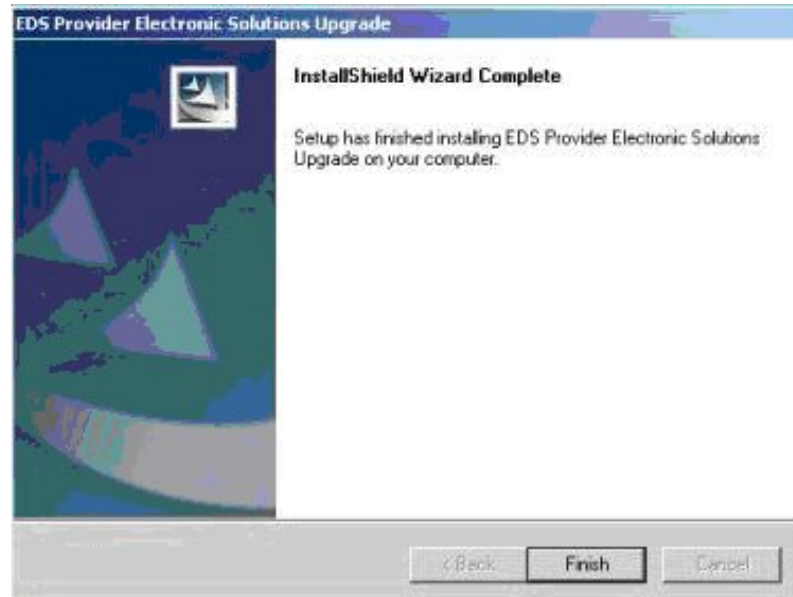


**Step 4** Upgrade files are extracted and another upgrade message displays to confirm the upgrade to PES version 5.0. Click **Next**.

**Step 5** A finished message displays. Click **Finish**.



**Step 6** A second finished message displays. Click **Finish**.

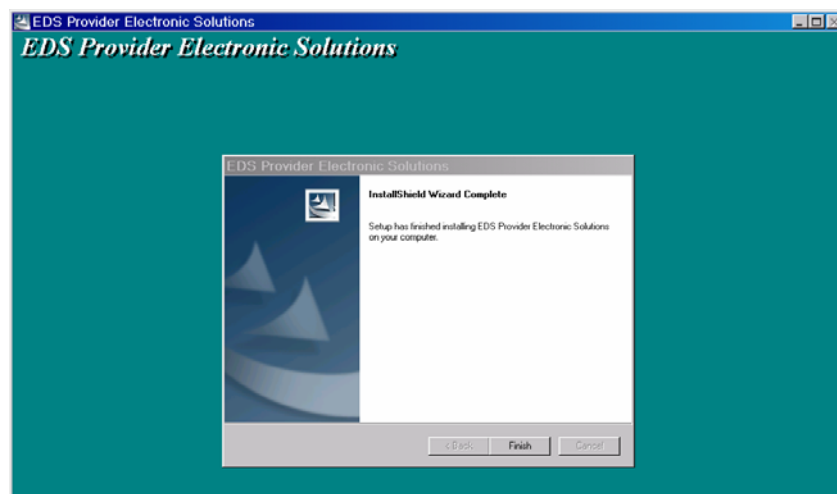


**Step 7** Go to Completing the Upgrade and Getting Started.

### Completing the Upgrade and Starting PES

When upgrade is complete, do not remove the CD until the upgrade process returns you to the desktop view.

**Step 1** Click the **Finish** button to exit upgrading. When upgrading is complete, a folder will be available on the users desktop that contains two icons. A PES icon to start the application and an Upgrade icon that checks for future upgrades from BBS.



**Step 2** To start PES, double-click the blue **EDS PES** icon in the folder labeled "ID EDS Provider Electronic Solutions" or click on the **Start** button in the Windows menu bar and select **Programs**. Select **ID EDS Provider Electronic Solutions**.